

Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:
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SECRETARY OF THE SENATE
PUBLIC RECORDS
2019 AUG 22 PM 2:33

Post-Travel Filing Instructions: Complete this form within 30 days of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building.**

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☒ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**
- ☒ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)
Bill and Melinda Gates Foundation

Private Sponsor(s) (list all): _____

August 6th-8th

Travel date(s): _____

N/A

Name of accompanying family member (if any): _____

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING **DID NOT INCREASE** DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input checked="" type="checkbox"/> Good Faith Estimate <input type="checkbox"/> Actual Amount	\$58.00 (round trip mileage and tolls)	\$188.00 for two nights total	\$110.50	\$402.50 (meeting room fees includes facilities, set up/take down, cleaning, meeting materials)

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate <input type="checkbox"/> Actual Amount	N/A	N/A	N/A	N/A

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): Meetings included discussions and presentations on topics related to the implementation of the Every student Succeeds Act.

Also attended dinners both evenings.

8-22-19
(Date)

Amanda Beaumont
(Printed name of traveler)

Amanda Beaumont
(Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

8-22-19
(Date)

Patty Murray
(Signature of Supervising Senator/Officer)

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics in SH-220**. Incomplete and late travel submissions will not be considered or approved. This form must be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Name of Traveler: Amanda Beaumont

Employing Office/Committee: Senate HELP Committee - Patty Murray

Private Sponsor(s) (list all): The Aspen Institute Inc (Education and Society Program)

Travel date(s): Aug 6-8 2019

Note: If you plan to extend the trip for any reason you must notify the Committee.

Destination(s): Warrenton, VA

Explain how this trip is specifically connected to the traveler's official or representational duties:

This trip will cover topics related to the implementation of the Every Student Succeeds Act. I am Senator Murray's primary policy advisor on the Every Student Succeeds Act and the lessons learned from this trip will help inform my ongoing Senate policy work.

Name of accompanying family member (if any): n/a

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

07-02-19
(Date)

Amanda Beaumont
(Signature of Employee)

☐ TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

☐ I, Patty Murray hereby authorize Amanda Beaumont
(Print Senator's/Officer's Name) (Print Traveler's Name)

☐ an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

☐ I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

07-02-19
(Date)

Patty Murray
(Signature of Supervising Senator/Officer)

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors):
The Aspen Institute, Inc. (Education and Society Program)
2. Description of the trip: Aspen Institute Education and Society program sponsored convening for senior education staffers on the Implementation of the Every Student Succeeds Act (ESSA) and next steps.
3. Dates of travel: August 6-8, 2019
4. Place of travel: Warrenton, VA
5. Name and title of Senate invitees: Please see attached roster
6. I *certify* that the trip fits one of the following categories:
☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal **and** do not retain or employ registered lobbyists or agents of a foreign principal **and** no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
=OR=
☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
=AND=
☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I *certify* that:
☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
=AND=
☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

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☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (see questions 6 and 10).

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

- 12. Briefly describe the role of each sponsor in organizing and conducting the trip:**

The Aspen Institute is the sole sponsor of this retreat and is solely responsible for the development and execution of the convening. (see continued response)

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:
- The Aspen Institute is an educational and policy studies non-profit organization whose mission is to foster leadership based on enduring values and provide a non-partisan forum for the exchange of ideas.

(see continued response)

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

The Aspen Institute has a nearly forty year history of conducting non-partisan educational forums, which often include Members of Congress and staff. The Aspen Institute Education and Society program has been conducting convenings for Congressional education staff for over twelve years.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

The Aspen Institute holds numerous educational activities, including educational briefings, roundtables, forums, and conferences for a diverse range of attendees including federal and state policymakers, business and organizational leaders, members of the press and the general (see continued response)

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate <input type="checkbox"/> Actual Amounts	\$58.00 (round trip mileage and tolls)	\$188.00 for two nights total	\$110.50	\$402.50 meeting room fees (includes meeting facilities, set up/take down, cleaning, meeting materials)

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

b) The trip is organized specifically with regard to Congressional staff participation in order to support their learning on implementation of the Every Student Succeeds Act.

18. Reason for selecting the location of the event or trip

The location is close to Washington, DC for easy staffer travel and allows faculty members (external experts brought in to support the retreat) to fly into DCA, Dulles or BWI and travel easily to the facility.

19. Name and location of hotel or other lodging facility:

Airlie House, 6809 Airlie Road, Warrenton, VA 20187

20. Reason(s) for selecting hotel or other lodging facility:

The meeting location has sufficient meeting space and lodging to support off-the-record, non-partisan exchanges of ideas and professional learning.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

Meals are 8/6/19 \$14.25 per day, 8/7/19 \$55.00 per day, 8/8/19 \$41.25 per day, which reflects the per diem limit

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Transportation is not provided; mileage will be reimbursed for participants' travel by personal car

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

None

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Signature of Travel Sponsor:

Name and Title: Elliot Gerson, Executive Vice President, Policy & Public Programs

Name of Organization: The Aspen Institute

Address: 2300 N Street NW, Suite 700, Washington, DC 20037

Telephone Number: 202-736-5859 (Lisa Jones, Deputy General Counsel)

Fax Number: 202-467-0790

E-mail Address: lisa.jones@aspeninst.org

Appendix to Private Sponsor Travel Certification Form

Aspen Institute Senior Congressional Education Staff Network Retreat, August 6-8, 2019.

Question 12. Briefly describe the role of each sponsor in organizing and conducting the trip (response continued) -- The Bill & Melinda Gates Foundation is not a sponsor of this trip and did not play a role in organizing, planning or conducting the trip. The Foundation provided grant funding to support the Aspen Institute Education & Society Program, including the Aspen Senior Congressional Education Staff Network; however, the Foundation did not earmark any funding for this trip.

Questions 13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to the mission (response continued) – The Aspen Institute Education and Society Program seeks to provide a neutral forum to aid education policymakers in their efforts to improve K-12 public education. The purpose of the trip is to conduct a non-partisan educational retreat that encourages off-the-record, candid exchanges of ideas to support staffers' learning.

Question 15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips) (response continued) – The Aspen Institute organizes numerous educational activities, including educational briefings, roundtables, forums and conferences for a diverse range of attendees including federal and state policymakers, business and organizational leaders, members of the press and the general public. The Aspen Institute Education and Society Program works with federal, state and local education leaders to improve K-12 student achievement, particularly for underserved students.

Aspen Senior Congressional Education Staff Network Retreat

Implementing ESSA: School Improvement and Innovation

Airlie House
6809 Airlie Road
Warrenton, VA 20187
P: 540-347-1300

August 6-8, 2019

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- *To what extent and why are SEAs amending their approved ESSA plans and/or seeking waivers? How are states ensuring waivers improve equity in their ESSA plans?*
- *What role has the U.S. Department of Education (ED) played during the first year of implementation, including ED's monitoring processes in states, and what are state and districts expectations for what they should be doing in year 2 and beyond?*

3:15 – 3:30 PM

Break

3:30 – 5:00 PM

Session II: Innovation in Teaching & Learning, Accountability & Assessment

Virgel Hammonds, Chief Learning Officer, KnowledgeWorks

Leah Walker, Director, Office of Equity and Community Engagement, Virginia Department of Education

Cindy Ambrose, Deputy Superintendent, Charleston County School District

Tiffany Stanley, Chief of Staff to the State Superintendent of Public Instruction, Utah State Board of Education

Faculty will present for the first half of the session, followed by a facilitated discussion.

Faculty will detail how states and districts are currently using innovative approaches to teaching and learning, accountability and assessment, to increase equity and outcomes for all students. They will describe how innovation intersects with ESSA and other federal and state laws and policies and where there are challenges or additional opportunities.

Guiding Questions:

- *What teaching and learning innovations, such as personalized learning or course access are states and districts pursuing as a result of ESSA (and/or federal policy)?*
- *Is Innovative Assessment Pilot enough to encouraging enough innovative assessment practices?*
How do these innovations support ESSA's equity and outcome goals?
- *How are these models being evaluated for impact? Or being used to support and complement school improvement initiatives?*

5:00 – 5:15 PM

Taking stock: Staff reflections and feedback to guide remaining discussions

6:30 PM

Networking Reception with Expert Faculty

Pavilion Room

Staffers will have the opportunity to network with faculty during the reception.

7:00 – 8:30 PM

Dinner with Discussion of Earlier Sessions

Pavilion Room

Wednesday, August 7, 2019

All meeting sessions are in the Federal Room

7:30 – 8:30 AM

Breakfast

Airlie Room

8:30 – 8:35 PM

Group reflection on Day 1: What thoughts and questions were raised for further discussion?

- *What implications for equity can we draw from innovative efforts at the state and district levels to date?*
- *What is the role of ESSA relative to other state and/or district policies, practices, and/or funding streams in supporting innovation? How could these policies be more coherent and aligned?*

3:15 – 3:30 PM

Break

3:30 – 4:45 PM

Session VI: Exploring Report Cards in the ESSA Era

Leah Walker, Director, Office of Equity and Community Engagement, Virginia Department of Education

Bryan Johnson, Superintendent, Hamilton County Schools

Tiffany Stanley, Chief of Staff to the State Superintendent of Public Instruction, Utah State Board of Education

Guiding Questions:

- *How is ESSA's theory of action around transparency and school improvement playing out?*
- *How are report cards helping to highlight equity? Are states complying with all of the reporting requirements under the law? Are there any concerns about transparency, accessibility, and disaggregation?*
- *How are SEAs and LEAs reporting on required additional measures (such as discipline or teacher quality data), or additional measures they have chosen to report on that do not contribute to accountability determinations?*
Which SEA or LEA report cards are especially well-designed? What about them seems most promising?

4:45 – 5:15 PM

Taking stock: Staff reflections and feedback to guide remaining discussions

6:00 – 7:00 PM

Networking Reception with Expert Faculty

Pavilion Room

Staffers will have the opportunity to network with faculty during the reception.

7:00 – 8:30 PM

Dinner with Discussion of Earlier Sessions

Pavilion Room

Thursday, August 8, 2019

All meeting sessions are in the Federal Room

7:30 – 8:30 AM

Breakfast

Airlie Room

8:30 – 8:40 AM

Staff reflections and feedback to guide remaining discussion

8:40 – 10:20 AM

Session VII: Future Opportunities for Connecting Innovation and School Improvement under ESSA

Guiding Questions:

- *How can state and district leaders leverage innovative practices to support school improvement efforts? What are the technical and adaptive challenges to achieving this?*

- *What is needed to ensure innovative practices comply with the law's requirements for evidence-based school improvement?*
- *How tight/loose do SEAs and LEAs need to be to create space for innovation while meeting required timelines for improvement and outcomes?*
- *What role can Congress and ED play to ensure SEA and LEA leaders are using federal funds to support innovation, while ensuring those federal funds are used on evidence-based school improvement efforts?*

10:20 – 10:30 AM	Break	
10:30 – 10:50 AM	Complete Retreat Evaluation	
10:50 – 11:20 AM	Final Observations from Expert Faculty	
11:20 – 11:45 PM	Taking Stock: Staff Reflections and Feedback to Guide Next Steps for the Network	
12:00 – 1:00 PM	Lunch and Adjourn	Airlie Room

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